RYANAIR

CYPRUS MARCH 2021

RYANAIR

🥙 Europe's Lowest Cost Airline Group

- ✤ Lowest fare/lowest cost airlines
- → No. 1, Traffic (149m) & Cov. (2,000+ routes)
- ✤ No. 1, Cust. Service / On-time perf. (96%)
- → Strong (BBB) balance sheet (S&P & Fitch)
- ✤ Leading B- CDP climate protection rating
- → 210 Boeing "gamechanger" a/c orders
- → Fin strength + lowest cost = L.T. winner





🥙 Europe's Lowest Fares

	Avg. Fare	Change	% > Ryanair
Ryanair	€37	+2%	
Wizz	€43	-3%	+16%
easyJet	€59	-3%	+59%
Norwegian	€99	+9%	+168%
Lufthansa	€178	+1%	+381%
IAG	€190	-	+414%
AF/KLM	€213	+1%	+476%
Avg Competitor Fare	€131 (Source: FY results/,	Annual Reports)	+254%





🖤 Europe's No. 1 Coverage

ABERDEEN LAPPEENRANTA GLASGOW (I) EDINBURGH OSLO (G) 81 bases / 240 airports \rightarrow GLASGOW (P) DERRY HAUGESUND **BELFAST CITY** TALLINN VÄSTERÅS BELFAST TORP NEWCASTLE KNOCK STOCKHOLM TEESSIDE SHANNON LIVERPOOL VÄXJÖ AALBORG LEEDS KERRY MANCHESTER RIGA AARHUS 40 countries EAST MIDLANDS CORK COPENHAGEN PALANGA BILLUND BIRMINGHAM KAUNAS MALMO CARDIFF LONDON (L HAMBURG **GDANSK** VILNIUS BREMEN SZCZECIN LONDON (ST BRISTOL OLSZTYN-MAZURY BYDGOSZCZ IÜNSTER (OS) LONDON (SO EXETER DORTMUND NEWQUAY LONDON (G) AMSTERDAM POZNAN WARSAW (C) S.21 Base update: BOURNEMOUTH \rightarrow EINDHOVEN ERFURT MAASTRICHT LODZ LUBLIN BREST WROCLAW KYIV PARIS (B) KATOWICE KHARKIV LUXEMBOURG KRAKOW RZESZOW VATRY TOURS OSTRAVA LVIV NUREMBERG NANTES BRNO KOSICE FRIEDRICHSHAFEN POITIERS DOLE BADEN LA ROCHELLE - New: BVA/TSF/CHQ/CFU/RHO/ZAG/ZAD BRATISLAVA SUCEAVA KHERSON LIMOGES SALZBURG BRIVE BASEL BUDAPEST **ODESA** BERGERAC TIMISOARA ORADEA SANTIAGO **ENICE** RODEZ ZAGREB SIBIU CLUJ SANTANDER BIARRITZ - Incr. a/c: IT (+6 each), MRS (+1) TRIESTE VENICE (M) NIMES TURIN TOULOUSE PULA BANJA LUKA CUNEO O PARMA BUCHAREST PORTO VITORIA LOURDES GENOA BOLOGNA MARSEILLE CARCASSONNE VALLADOLID ZADAR NICE VARNA BEZIERS PERPIGNAN RIMINI SPLIT NIŠ PISA - More to come ZARAGOZA **BARCELONA** (G) LISBON MADRID ANCONA DUBROVNIK PERUGIA SOFIA BARCELONA TERCEIRA BURGAS PESCARA CASTELLON PODGORICA **REUS** FIGARI PLOVDIV FARO **ROME (F PONTA DELGADA** VALENCIA ROME (C) MENORCA BARI **SEVILLE** ALGHERO ALICANTE JEREZ PAL MA NAPLES BRINDISI Over 2,000 routes THESSALONIKI MURCIA LANZAROTE \rightarrow CAGLIARI MALAGA ALMERIA **TENERIFE** (S) AKTION PREVEZA AMEZIA TANGIER TETOUAN BODRUM **TENERIFE (N)** PALERMO KEFALONIA DALAMAN RABAT **GRAN CANARIA** NADOR TRAPANI MYKONO ZANKYNTHOS **FEZ** OUJDA FUERTEVENTURA COMISO KALAMAT ESSAOUIRA SANTORINI **MALTA** 200m guests p.a. by FY26 HERAKLION MARRAKESH PAPHOS OUARZAZATE AGADIR TEL AVIV AMMAN

RYANAIR

EILAT AQABA

$\overline{\mathscr{V}}$ CYPRUS holidays on track for S21

- → 70% of EU adult pop. vax by end June
- \rightarrow EU travel can resume for school holiday season
- → Cyprus & Israel green corridor from Apr
- → Cyprus welcome UK visitors from May
- ➔ If plans change £ zero flight change fee
- ✤ Recent surge in RYR bookings shows pent-up demand
- \rightarrow RYR key driver in reviving tourism





- → 2 airports (1 base)
- → 3 based a/c
- → 34 routes (5 NEW from PFO)
- ✤ To/from 19 countries
- → 106 weekly flights
- → 90 direct jobs





🖤 LARNACA S21 NETWORK

→ 2 routes, Brussels and Vienna (2pw)
→ From July
→ 4 weekly flights





🏹 PAPHOS S21 NETWORK

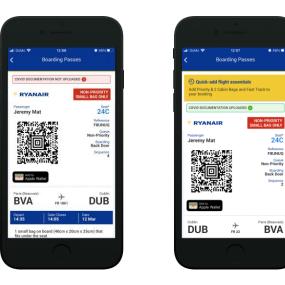
- → Biggest summer ever
- → 5 new routes
 - Bologna (1pw) Jul
 - Bari (2pw) Jul
 - Corfu (2pw) Jul
 - Rhodes (2pw) Jul
 - Treviso (2pw) Jun
- → 32 routes
- → 102 weekly flights
- → 3 based aircraft
- → 90 direct jobs

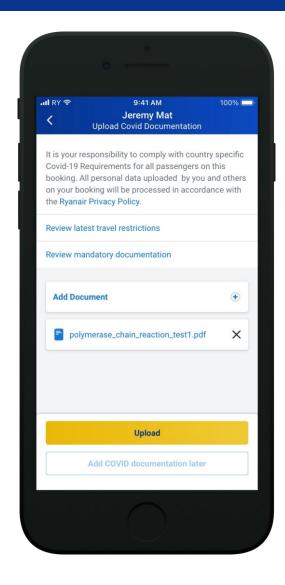




🆤 S21 - Making travel easier

- → Healthy flying measures continue
- → New Covid-19 Travel Cert
- ✤ Constant C-19 travel updates on RYR.com
- → Zero flight change fee till Oct '21









→ RYR driving recovery of tourism with expanded S21 schedule

→ New Covid-19 Travel Cert/Wallet to save all required travel docs

→ Zero flight change fee – giving customers flexibility

→ CY S21: 106 flights pw, 34 routes, 5 New from PFO

→ RYR's commitment to place Cyprus tourism back on track



